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ABSTRACT

Prior research on learning has been linked to instruction by the derivation of general principles of instructional design from learning theories. However, such design principles are often difficult to apply to particular instructional issues. A new method for relating research on learning to instructional design is proposed: Different ways of teaching a particular topic can be evaluated by teaching that topic to a simulation model of learning and recording the complexity of the resulting learning processes. A study to compare two mathematically correct algorithms for computing the difference between two multi-digit numbers from a conceptual or mechanical perspective was designed for both methodological and substantive purposes. The algorithms chosen to model were "regrouping" and "augmenting". Explanations of the architecture of simulation system production are provided. Learning difficulty is determined by the number of states and cycles that the simulation system carries out to learn the method carried out over all the training problems. Results of the learning runs imply that regrouping is more difficult that augmenting, and that learning subtraction conceptually is more difficult than learning it mechanically, a conclusion that would seem to contradict widely held beliefs in the mathematics education community. The presuppositions that accurate simulation models can be developed are discussed and the advantages and disadvantages of the general method of simulation use are evaluated. (MDH)

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Artificial Instruction.
A Method for Relating Learning Theory to Instructional Design

Stellan Ohlsson
The Learning Research and Development Center,
University of Pittsburgh, Pittsburgh, PA 15260, USA

Technical Report No. KUL-90-05
September, 1990

Center for the Study of Learning

LEARNING RESEARCH AND DEVELOPMENT CENTER

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In the past, research on learning has been linked to instruction by the derivation of general principles of instructional design from learning theories. But such design principles are often difficult to apply to particular instructional issues. A new method for relating research on learning to instructional design is proposed: Different ways of teaching a particular topic can be evaluated by teaching that topic to a simulation model of learning and recording the complexity of the resulting learning processes. An application of this method to a traditional problem in mathematics education suggests that conceptual instruction in arithmetic causes more cognitive strain than mechanical instruction, contrary to a widely held belief in the mathematics education community. The advantages and disadvantages of the general method are discussed.

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Knowledge and Understanding in Human Learning

Knowledge and Understanding in Human Learning is an umbrella term for a loosely connected set of activities lead by Stellan Ohlsson at the Learning Research and Development Center, University of Pittsburgh. The aim of KUL is to clarify the role of *world knowledge* in human thinking, reasoning, and problem solving. World knowledge consists of concepts and principles, and contrasts with facts (episodic knowledge) and with cognitive skills (procedural knowledge). The long term goal is to answer six questions: How can the concepts and principles of particular domains be identified? How are concepts and principles acquired? How can the acquisition of concepts and principles be assessed? How are concepts and principles encoded in the mind? How are concepts and principles utilized in performance and learning? How can instruction facilitate the acquisition and utilization of concepts and principles (as opposed to episodic or procedural knowledge)? Different methodologies are used to investigate these questions: Psychological experiments, protocol studies, computer simulations, historical studies, semantic, logical, and mathematical analyses, instructional intervention studies, and so on. A list of KUL reports appear at the back of this report.

Abstract

In the past, research on learning has been linked to instruction by the derivation of general principles of instructional design from learning theories. But such design principles are often difficult to apply to particular instructional issues. A new method for relating research on learning to instructional design is proposed: Different ways of teaching a particular topic can be evaluated by teaching that topic to a simulation model of learning and recording the complexity of the resulting learning processes. An application of this method to a traditional problem in mathematics education suggests that conceptual instruction in arithmetic causes more cognitive strain than mechanical instruction, contrary to a widely held belief in the mathematics education community. The advantages and disadvantages of the general method are discussed.

Keywords: Arithmetic, augmenting, computer simulation, instructional design, learning theory, regrouping, subtraction, understanding

On the Relation Between Learning Theory and Instruction

Instruction is an artefact, a social practice deliberately designed to achieve a particular purpose. A theory of instruction is therefore a *prescriptive* theory. The task of such a theory is to state principles that constrain search through the space of instructional designs [30]. A theory of learning, on the other hand, is a *descriptive* theory. The task of a learning theory is to state principles that accurately describe the mechanisms of cognitive change. Instructional theory and learning theory are distinct intellectual enterprises, just as agriculture and botany, medicine and physiology, engineering and physics are distinct enterprises [10, 12].

As these analogies suggest, the enterprises of instruction and learning, although distinct, are closely related. Physical therapies that ignore the chemistry and physiology of the human body are likely to do the patient more damage than good; machines that violate the laws of physics cannot work. Similarly, instructional designs that are not in accord with the mechanisms of cognitive change are unlikely to facilitate learning.

The notion that a theory of instruction should be informed by a theory of learning is hardly controversial when stated abstractly. Glaser traces this idea back to both John Dewey and Edward L. Thorndike [10], but there are many recent advocates [13, 32, 34, 35]. But how, specifically, are the two enterprises supposed to interact? How can instructional designs be informed by principles of learning? The traditional method for applying learning theory to instructional questions is to derive general principles of instruction from general principles of learning; the application of the derived principles to the design of instruction in a particular topic is left to the designer. The first systematic application of this method was launched by the behaviorists. Principles of stimulus-response relations and reinforcement gave rise to instructional principles that emphasized behavioral objectives and maximally efficient reinforcement schedules [11]. The application of piagetian research to instructional questions has taken a similar form: The principle that equilibrium requires a balance between assimilation and accomodation has given rise to

training programs that deliberately induce disequilibrium in order to accelerate cognitive change [22]. David Ausubel's theory of learning as successive elaboration gave rise to Reigeluth's theory of instructional design [32]. In each approach, general principles of instruction are derived from general principles of learning, but the application of those design principles to particular instructional topics is based on intuition, common sense, and seat-of-the-pants judgments.

Modern cognitive psychology, based on information processing concepts, has surpassed past approaches with respect to the power of its theories, and with respect to the depth and the detail of its descriptions of cognitive processes. But its application to instructional questions has so far taken the same old form: General principles of instructional design are derived from general principles of learning; the application of those principles to particular instructional designs is left to the designer. For example, the principles of the ACT* theory [1] have given rise to several instructional principles, including that one should teach the goal tree for cognitive skills [2]. This principle is surely correct, but its application to a particular instructional topic is nevertheless problematic. How is this principle to be applied, for example, in the teaching of arithmetic? Should one teach the entire goal tree for subtraction with regrouping to all students, even to very young students? Are there no situations in which the complexity of the goal tree might be an obstacle to learning? Should the entire goal tree be taught at once, or should one introduce it component by component? If so, how should the components be sequenced? The general principle does not, by itself, answer instructional questions of this detailed sort.

This chapter explores a different approach to the interaction between the theory of learning and the theory of instruction. Instead of deriving *general* principles of instruction from a learning theory, this approach exploits the fact that information processing theories of learning can be embodied in runnable simulation models to answer *particular* instructional questions. A common and important type of instructional problem--perhaps the only type--is to decide between alternative ways of teaching a particular topic. Problems of this type can be solved, I suggest, by teaching the relevant topic to a simulation model of learning. To compare two ways of teaching a particular topic,

we teach that topic to the learning model in both ways, and we measure the computational complexity of the learning processes induced in the two cases. If the simulation model expends less computational work to learn under one form of instruction than under another, then it predicts that the former is preferable to the latter. The main purpose of this chapter is to present an application of this method to a traditional issue in arithmetic instruction.

The method of teachable simulation models has three prerequisites. First, it requires a *runnable* model. So-called information processing models that consist of labelled boxes with arrows of varying thickness going in and out of them are of no help; neither are computer models with such shaky implementation that they can barely produce a single demonstration run without breaking; neither are programs that only embody *some* of the assumptions of the underlying theory (while the other assumptions are embodied in some other program). The method of teachable simulation models requires a robust, integrated computer model that can be run on a variety of inputs. Second, the method requires that the simulation model is capable of *learning*. A performance model is not enough. Third, the learning mechanisms of the model must be such that their inputs can be interpreted as *instruction*. A model of learning by doing is not enough; the method requires a model of learning from declarative messages that originate in an outside source. The HS model described below satisfies these three prerequisites.

The particular instructional question investigated in this chapter concerns the teaching of arithmetic. The question of how to teach an arithmetic skill like subtraction has been approached in different ways by different generations of researchers. An earlier generation focussed on the question of which subtraction algorithm is easier for children to learn. Large scale empirical research programs were launched to answer this question [5, 6]. The answer was, briefly summarized, that the method of regrouping (or "decomposition") is easier to learn than the method of augmentation (or "equal addition"), at least when subtraction is taught conceptually (as opposed to mechanically). I show in this chapter that the method of teachable simulation models implies a different answer to this question.

The current generation of researchers in mathematics education focusses on the contrast between rote and insightful learning of arithmetic algorithms. They strive to find methods that facilitate school children's acquisition of the conceptual rationale for arithmetic algorithms, in the hope that conceptual understanding will eliminate errors, improve retention, and faciliate transfer to unfamiliar problems [15]. The method of teachable simulation models leads me to a rather contrary answer to this question.

In summary, the present chapter has both a methodological and a substantive purpose. I propose a general method that exploits the fact that information processing theories of learning can be embodied in runnable simulation models to answer particular instructional questions. The method is introduced in the context of a particular application. The application is not merely a demonstration of the method. The specific conclusions reached have important implications for instruction in arithmetic.

Regrouping versus Augmenting

There are several mathematically correct algorithms for computing the difference between two multi-digit integers. Educational researchers at the beginning of this century asked whether one of these algorithms is easier to learn than the others, a very reasonable question. In the *regrouping* algorithm non-canonical columns, i. e., columns in which the minuend digit is smaller than the subtrahend digit, are dealt with by incrementing the relevant minuend digit with one place-value unit. To keep the value of the minuend constant, this change in the minuend is compensated by decrementing the first non-zero minuend digit with a higher place value than the incremented digit. In the *augmenting* algorithm non-canonical columns are also dealt with by incrementing the minuend digit, but in this case the change in the minuend is compensated by *incrementing* the *subtrahend* digit with the next higher place value. (Strictly speaking, the entities which are incremented and decremented are the *numbers* which the digits refer to. Since no ambiguity results, I use the somewhat inaccurate locution "decrementing a digit" instead of the accurate but tedious "decrementing the number a particular digit refers to" .)

Which algorithm is easier?

The regrouping and augmenting algorithms build on different mathematical ideas. The regrouping algorithm is based on *the associative law*

$$(a + b) + c = a + (b + c).$$

The associative law implies that the value of the minuend remains constant through the regrouping operation. (A complete derivation of the regrouping algorithm from first principles is available in [25].) The augmenting algorithm, on the other hand, is based on *the constant difference law*

$$a - b = (a + k) - (b + k).$$

This law implies that the difference between the minuend and the subtrahend remains constant through the augmenting operation. (A more detailed discussion of the rationale for the augmenting algorithm is available in [8].) Since the two algorithms build on different mathematical ideas, it is entirely plausible that one of them is easier to learn and/or to execute than the other.

Large-scale classroom studies were performed in the early decades of this century in an effort to settle this issue empirically. William Brownell concluded: "Even a cursory survey of the ... experimental results ... reveals the impossibility of deciding simply and finally between D [the regrouping method] and EA [the equal addition method] as the better procedure for teaching 'borrowing'" [5, p. 169]. Augmenting was found to be easier than regrouping more often than the other way around, but the observed difference was small in magnitude. Brownell argued that the results were only in favor of augmenting when subtraction was taught as a mechanical performance. If subtraction was taught conceptually, he claimed, the results favored regrouping [5, 6]). Brownell's argument was widely accepted and politically instrumental in settling the issue in favor of teaching the regrouping method in American schools. Educators in other nations were not equally

convinced, and the augmenting method is still taught in some European schools.

The empirical studies did not clearly distinguish between performance and learning. They confused the question *which algorithm is easier to use*? with the question *which algorithm is easier to learn*? One reason for the lack of separation of these two questions is that pure measures of learning are hard to come by. We can only observe by recording performances, so most empirical measures will confound the two questions. In the context of a simulation model, the two questions can be cleanly separated. This section investigates which algorithm is easier to use, while the next section investigates which algorithm is easier to learn.

In information processing terminology, the question of which algorithm is easier to use can be reformulated as follows: What is the relation between the cognitive complexity of the mental procedure corresponding to the regrouping algorithm and the cognitive complexity of the procedure corresponding to the augmenting algorithm? This question can be answered by implementing the two algorithms as psychologically plausible simulation models, run those models, and measure their relative complexity.

Simulating regrouping and augmenting

The hypothesis that cognitive skills (mental procedures) are encoded as production systems was first proposed by Allen Newell and Herbert A. Simon [23], and has been adopted by a number of researchers [1, 18, 19]. According to the production system hypothesis, cognitive skills are encoded in sets of *production rules*, where each production rule has the general form

Goal + Situation --> Action.

The symbol "Goal" stands for a specification of a desired situation, "Situation" stands for a description of the relevant features of the current situation, and "Action" refers to something the person knows how to do. The intended interpretation of such a rule is that

when the person has the specified goal, and he or she is in a situation that fits the situation description, then he or she will consider the specified action. A collection of interrelated production rules is a *production system*. Each cognitive skill is hypothesized to correspond to a production system.

A production system *architecture* is a program that can interpret a production system. In this context, to interpret means to (a) decide which production rules (in a particular production system) are satisfied in the current situation, (b) select one or more rules to be evoked, and (c) execute the actions of the evoked rules. Each pass through the three steps (a)-(c) is one production system *cycle*, or operating cycle. The number of cycles required to execute a production system is one of the measures of cognitive complexity used in this chapter.

The satisfied rules are identified by matching the Situation against the so-called working memory, a data base which contains the system's information about the current state of affairs, and by matching the Goal against the system's current goal. If both components match, the rule is satisfied and is therefore a candidate for being evoked. Selecting which rules to evoke is sometimes called *conflict resolution* [21]. A typical conflict resolution scheme is to select those rules that match against the most recent information in working memory. Execution of the primitive actions must involve calls on motor programs that control the muscles of the relevant limbs, e. g., the finger muscles for the action of writing a digit, but production system theories do not have much to say about this aspect of human cognition.

The HS architecture is a relatively standard production system architecture. It has a single working memory which contains information about both the current state of affairs, and the systems' current goal(s). All available rules are matched against working memory in each operating cycle. There is no conflict resolution. Every satisfied rule is evoked. There is no complexity limitation on the left-hand side of the rules, but the right-hand side (the action part) is limited to a single action. The system continues

to match and evoke rules until either there are no satisfied rules, or the current problem is solved. Detailed descriptions of the HS architecture are available in [28, 29].

Table 1. The distribution of production rules in two canonicalization algorithms.

Rule type	Regrouping	Augmenting
Visual	4	3
Motor	11	11
Write & cross out	6	6
Say answer	5	5
Cognitive	20	17
Create expressions	11	12
Revise expressions	9	5
Memory	3	4
All rules	38	35

In order to simulate subtraction with regrouping, the HS system was extended with a (simulated) task display and a (simulated) visual-motor interface consisting of an eye and a hand. The *task display* is a data structure in the computer which contains the same information as a piece of paper with a subtraction problem written on it. Technically speaking, the task display is a two-dimensional array of digits. (I am assuming that the subtraction problem is written in vertical format.) Information about the task display

enters into the working memory of the HS system through a simulated *eye*, a program module which can only access one digit at a time. When the simulated eye 'looks' at a digit, information about that digit is entered into working memory. In order to gather information about some other digit, the eye has to be moved. The eye can move left, right, up, and down. Eye movements are distinct computational steps, so control of visual attention is encoded in production rules. The model can alter the external task display only through the use of a simulated *hand*. The hand can cross out an existing digit and write a digit in a blank space. These two primitive actions count as distinct computational steps, so the hand is also controlled by production rules. In short, the model simulates subtraction at the level of individual eye movements and individual writing actions, a very fine-grained level of analysis compared to most simulation models.

HS was also equipped with a long-term memory for number facts, e. g., 8 - 7 = 1. Retrieval of number facts was simulated with a function which returns the (correct) answer to any query about relations between two numbers. HS does not simulate the probabilistic nature of memory retrieval, nor the existence of incorrect number facts. Like attention allocation and writing, memory retrieval is a distinct computational step which is controlled by production rules.

The HS models of regrouping and augmenting consist of 38 and 35 production rules, respectively. The number of different rules in different categories are shown in Table 1. The distribution of rules over visual steps (i. e., move the eye), motor steps (i. e., write, cross out, and say the answer), cognitive steps (i. e., the creation and revision of working memory expressions), and memory steps (i. e., retrievals from long-term memory) is approximately the same for both models. The details of the rules themselves are not important for present purposes. Examples of complete production rules are available in [8].

In order to estimate the cognitive complexity of the two subtraction algorithms, the two simulation models were run on a

subtraction test consisting of 66 subtraction problems which varied with respect to number of columns, number of non-canonical columns, and number of *blocking zeroes*, i. e., zeroes immediately to the left of a non-canonical column (or another blocking zero). The number of production system cycles required by each model to complete each problem was recorded. In addition, each cycle was classified with respect to the type of rule that was evoked in that cycle.

The results are shown in Figure 1. The figure shows the cognitive complexity of the regrouping and augmenting algorithms on eleven different problem types. Problem types 1-4 have two, three, four, or five canonical columns, respectively, but no non-canonical columns. The number of cycles required to complete such problems is the same for both models. Problem types 5-8 have one, two, three, or five non-canonical columns, respectively. The regrouping model requires more steps to handle each such column than the augmenting model. The difference is small in magnitude. The difference is located entirely in the visual-motor interface, i. e., the regrouping algorithm requires more cycles because it involves more complicated attention allocation.

Problem types 9, 10, and 11 have one, two, or three blocking zeroes, respectively. (A blocking zero is immediately to the left of a non-canonical column or another blocking zero.) The regrouping model has a slight advantage on these problem types. The reason is that once a set of columns have been traversed by the regrouping procedure, no further regrouping of those columns is needed. The augmenting algorithm, on the other hand, has to augment every column with zero as the subtrahend digit and a non-zero minuend digit. Consequently, if there are several blocking zeroes in a problem, the regrouping algorithm completes that problem in slightly fewer operating cycles than the augmenting algorithm. Once again, the difference is small in magnitude. A more extensive discussion of these results is available in [8].

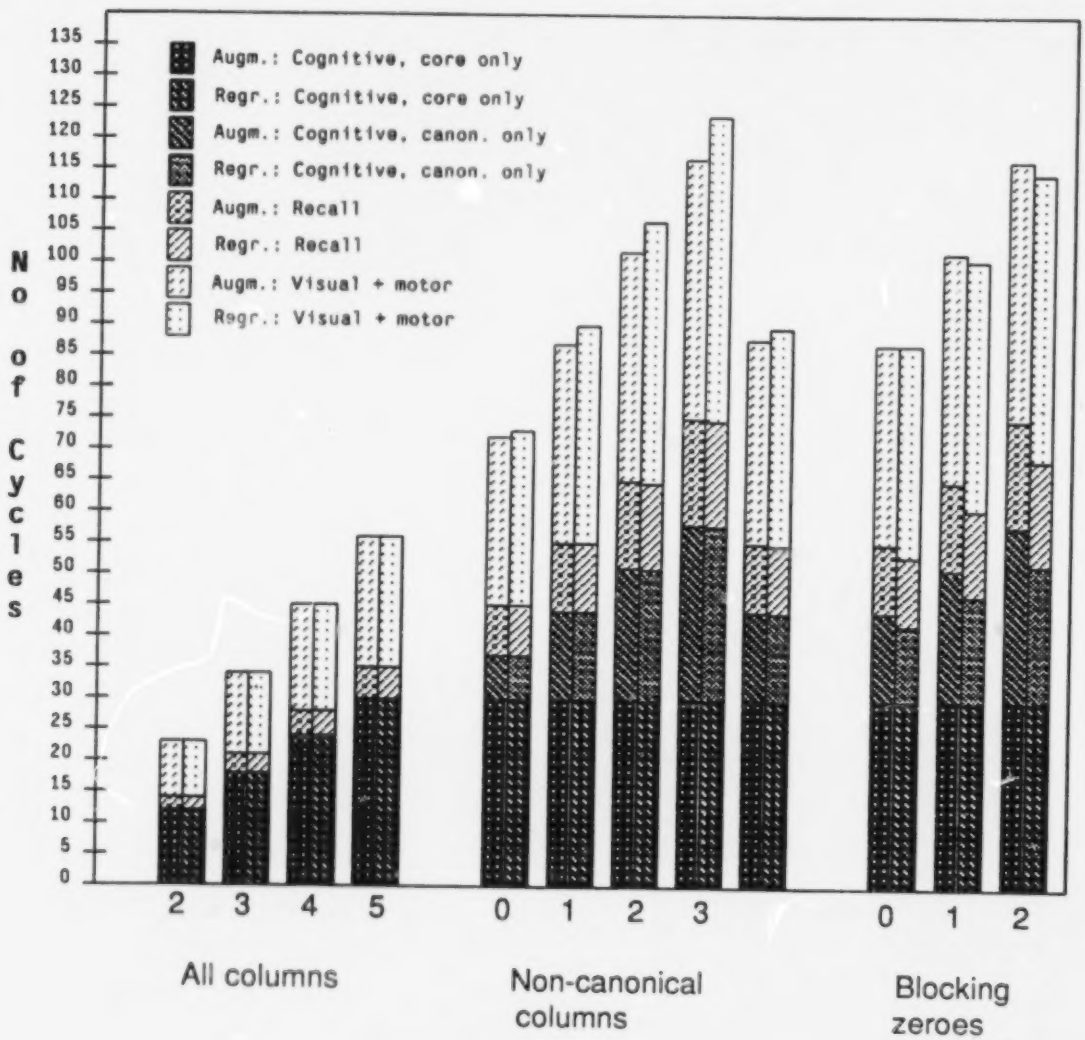

Figure 1. The number of production system cycles required to execute the regrouping and augmenting algorithms in eleven different problem types. The regrouping bar is to the right and the augmenting bar to the left for each problem type. Each bar is segmented to show the number of cognitive steps for canonical columns (bottom segment), cognitive steps for non-canonical columns (second segment from bottom), memory steps (third segment from bottom), and the number of eye and hand movements (top segment).

Discussion

The simulations of the regrouping and augmenting algorithms teach us several lessons. First, the difference between the two algorithms with respect to cognitive complexity is small in magnitude. Since the two algorithms are derived from different mathematical ideas, it is not obvious why this is so. Closer reflection reveals the reason. Both the law of associativity and the constant difference law are instances of a more general law which says that a quantity remains constant if every change in it is compensated by a corresponding counterchange. The structure of this law implies that the goal structure of the corresponding algorithm will contain two main subgoals: a change goal and a compensate goal. This is indeed the case for both algorithms. Furthermore, the internal structure of each change or compensation is always the same: Cross out a digit, compute the replacement digit, and write the replacement digit. Since the structure of the goal tree is similar in both algorithms, the number of cycles of operation is nearly equal. This equality is, in a sense, accidental. In general, there is no reason to expect different mathematical laws to generate algorithms with similar goal structures.

Second, the simulations show that the differences between the two algorithms have different directions on different types of problems. There is no difference on canonical problems. The difference is in favor of augmenting on problems which have non-canonical columns but no blocking zeroes. The difference is in favor of regrouping on problems which have two or more blocking zeroes. The implication of this result is that empirical measures of the cognitive complexity of the two algorithms will depend on the composition of the test. A test without blocking zeroes will favor the agumenting algorithm, but a test with many blocking zeroes will favor regrouping. In a mixed test the differences will tend to cancel each other. Unfortunately, some of the pre-World War II studies did not specify which subtraction problems were used to measure the students' performance.

The outcome of the simulation runs are consistent with the pattern of empirical results in the literature. If there are only

small differences, and if those differences go in different directions for different classes of problems, then we would expect empirical measurements to give inconsistent results. Sometimes one algorithm should appear to be easier, sometimes the other, due either to the composition of the test problems or to sampling error. This is exactly what the literature shows [5, 6].

These simulations imply that it does not matter which algorithm is taught. Regrouping and augmenting are equally complicated; the differences in cognitive complexity are too small to be of pedagogical significance. This conclusion is consistent with the fact that both algorithms are, in fact, taught in different school systems, without noticable higher degree of success in one system than in the other. However, the study summarized in this section (and reported in more detail in [8]) only concerned the *execution* of the two algorithms. The two algorithms are equally complex to use, once learned. But Brownell's argument was that regrouping is easier to learn than augmenting, at least if subtraction is taught conceptually. We therefore need to investigate the cognitive complexity of the *construction* (as opposed to execution) of the two algorithms. In addition, we need to compare the cognitive complexity of the construction under both conceptual and mechanical instruction.

Conceptual versus Mechanical Instruction

As mathematics educators deepen their analysis of mathematical cognition, they become more and more concerned with the question of conceptual understanding [15]. This concern is partly fuelled by research into childrens' mathematical errors. Catalogues of error patterns have been compiled for a number of mathematical tasks, including subtraction [4, 38, 39, 41] and fractions [9, 14, 17, 27, 31, 36, 37]. Most of the error patterns described in these catalogues are senseless; they have no discernable relation to the correct mathematical operations. To observe children making senseless mistakes is a frustrating experience, and it is impossible not to believe that if children only understood what they are doing, they would not make those mistakes. Following this line of

reasoning, mathematics educators have tried to design conceptually based instruction in arithmetic.

Does conceptual understanding help?

The purpose of many instructional interventions in arithmetic is to show that if children are taught the conceptual rationale for the arithmetic algorithms, they will have less difficulty in learning those algorithms, and their performance will be less error prone and more flexible in response to changing task demands [15]. Unfortunately, this enterprise has not been spectacularly successful.

A training study by Resnick and Omansson can serve as an example [33]. Children with faulty subtraction performance were taught the conceptual rationale of the regrouping algorithm with the help of Diene's blocks. The instruction was designed to force children to map back and forth between blocks and numbers. The children first performed a step with the blocks, and then performed the same step with the symbols. At the end of the instruction, several of the children could explain the correct subtraction procedure. When they were given subtraction problems to perform, they nevertheless made errors. As a second example, Ohlsson, Bee, and Zeller taught children how to add fractions with an interactive computer tool that enabled children to switch back and forth between graphical and numerical representations of fractional quantities [27]. A change in one representation was automatically mirrored by the corresponding change in the other representation. A detailed analysis of the children's performance on the pre- and posttests revealed that they could map back and forth between the fraction symbol x/y and concrete representations of fractional quantities. All of them nevertheless committed the standard error of adding fractions by adding both numerators and denominators on the posttest. In both of these studies, instruction that was carefully designed to make the meaning of the mathematical operations evident failed to prevent or cure senseless errors.

These empirical failures focus attention on the lack of theoretical analysis of conceptual understanding in the context of arithmetic. What is meant by conceptual understanding, and what is its (supposed) function in procedural learning? How does conceptual instruction interact with the construction of a mental procedure? Why should we believe that knowledge of the rationale of an arithmetic procedure facilitates the learning of that procedure? In spite of the recent emphasis on conceptual understanding in arithmetic instruction, little effort has been spent in answering these questions.

My approach to these questions is to extend the HS architecture with a learning mechanism that enables the model to learn procedures on the basis of instruction. The instruction is modeled as a set of declarative knowledge units that the user gives to the system. Such a learning mechanism enables us to *teach* the model how to do subtraction. We supply the system with a set of declarative knowledge units which correspond to the instructions a teacher would give a student, and the system learns by converting those knowledge units into a cognitive skill, i. e., into production rules. By giving the system *different* sets of declarative knowledge units, we can simulate the effects of *different* ways of teaching subtraction. In particular, we can compare conceptual instruction with mechanical instruction.

Making HS teachable

In a production system architecture, a *learning mechanism* is any process that can revise existing production rules or generate new ones. When a new rule is added to a production system, the behavior of the system changes. The new rule will control behavior in those situations in which it matches working memory. Since the new rule is different from previous rules, the system's behavior will be different. The fact that the behavior changes is the main reason to regard the generation of new rules as a simulation of (procedural) learning.

A number of simulation systems model procedural learning as the construction of new production rules (see, e. g., [1, 3, 16, 18, 19, 24, 39]). These models simulate learning by doing, i. e., they model the effects of *practice*. In spite of their differences, they all instantiate the same abstract theory. The first principle of this abstract theory is that humans have access to one or more weak problem solving mechanisms (analogy, hill climbing, planning, search, etc.) which can generate task oriented behavior on unfamiliar problems. The second principle is that information about each problem solving step--the reasons for taking it, the desirability of the outcome, the temporal order of the steps, and so on--is stored in long-term memory. The third principle of the abstract theory is that the learning mechanisms construct new rules through some form of induction over the individual steps. For example, the SAGE system described by Langley carries out forward search and stores steps in which a particular action had good outcomes, as well as steps in which that action had bad outcomes [20]. The system learns by identifying one or more situation features that discriminate between the two classes of situations, and it constructs a new rule by incorporating those features into the rule that controls that action. Different models of learning by doing differ with respect to which weak methods they postulate, which information they assume is stored in memory, and which induction procedure they use, but they all instantiate the three abstract principles stated above.

Simulation models that instantiate the abstract theory of learning by doing are quite successful in modeling the effects of practice. But models of practice are not sufficient for present purposes. There is nothing in such systems that correspond to instruction, i. e., to a set of messages that originate outside the system and which are used to construct new procedural knowledge. A learning mechanism which is to simulate learning from instruction must take declarative knowledge units among its inputs.

In the HS system, general world knowledge, including knowledge imparted by instruction, is assumed to consist of *constraints* on cognitive processes. For example, the laws of the number system

impose constraints on arithmetic operations. Unless an addition procedure yields the same result for (a + b) + c as for a + (b + c), i. e., unless it satisfies the constraint imposed by the associative law, it is not a correct addition procedure. The notion of general knowledge as constraints is not limited to arithmetic, or, indeed, to mathematics. For example, the laws of conservation of energy, mass, and momentum are examples of natural science principles which are naturally cast as constraints. Traffic laws are good examples of constraints in everyday life. I do not claim that all general knowledge can be formulated as constraints, only that constraints is one important form of knowledge, a form, moreover, which is particularly relevant to arithmetic. In the HS system, constraints are encoded in knowledge elements which are distinct from both working memory elements and from production rules.

An incorrect or incomplete arithmetic procedure typically leads to results that *violate* one or more of the relevant constraints. For example, an incorrect or incomplete regrouping procedure might violate the constraint that the value of the subtrahend is to remain constant over regrouping. The basic idea behind the HS system is that a constraint violation contains information about how to revise the faulty procedure so that similar constraint violations are avoided in the future. In each operating cycle, the system matches all available constraints against the current state of affairs. If a constraint is satisfied, no action is taken. If one or more constraints are violated, the learning mechanism is triggered. This corresponds to having a tutor who watches a problem solution and provides instruction when needed. (The HS system is given all the constraints at the beginning of the simulation run, rather than single constraints--instructions--at select points during a problem solving. Since the system effectively does not 'see' a constraint until it is violated, this difference to real tutoring is less significant than it first appears.) The learning mechanism analyzes the constraint violation, and revises the faulty rule accordingly. The technical details of the learning mechanism are not important for present purposes. A detailed description of the HS learning mechanism is available in [28, 29].

Since learning happens when the behavior of the system causes a constraint violation, there must be some initial rules which can generate behavior. HS must be supplied with at least one initial rule for each problem solving operator. In the simulation runs reported in this chapter, the initial rules are minimal, i. e., their condition sides contain only the applicability conditions for the relevant action. These incomplete rules generate almost random behavior. Each action is considered in every situation in which its applicability conditions are satisfied. The probability of causing a constraint violation is high. The system detects the violation, revises the faulty rule, and then starts over on the problem. The cycle of trying to solve the problem, detecting a violation, revising the faulty rule, and starting over continues until the problem can be solved without any constraint violations. This is a reasonable first approximation model of learning to solve problems under tutelage.

In summary, the HS system encodes declarative knowledge, including instructions, as constraints on behavior. In arithmetic, the effect of faulty or incomplete procedural knowledge is typically to generate results that violate the constraints imposed by the laws of numbers. HS learns by analyzing a constraint violation and revising the rule that caused the violation in such a way that similar constraint violations are avoided in the future. This capability makes HS *teachable*: To teach HS a particular procedure, the user supplies the system with an initial set of (incomplete) rules and the constraints that define the correct procedure. Each constraint corresponds to an instruction. The system tries to solve problems, makes mistakes, and learns from the instructions it has been given. If the instructions are complete enough, the system will eventually arrive at the correct procedure.

Teaching HS subtraction

The HS system was taught both the regrouping and the augmenting algorithms for subtraction, and both algorithms were taught in two different ways, corresponding to conceptual and mechanical instruction. This subsection describes the inputs to the

four simulation experiments, and the next subsection describes the results.

What does it mean to do subtraction procedurally, as a mechanical skill? A person who does subtraction mechanically is not thinking about the mathematical objects--the numbers--symbolized by the digits in the problem display, nor about the mathematical relations between those numbers. For example, he/she does not think about the fact that the "3" in the numeral "32" denotes the number 30. Instead, he/ she thinks about the digits themselves. He or she performs crossing out and writing actions on the physical display (i. e., the paper) without considering the mathematical meaning of those actions.

Consistent with this interpretation of what it means to do subtraction mechanically, HS was supplied with a representation of a subtraction problem that was isomorphic to the information available in a standard problem display (vertical format). The representation contained information about which digits occurred in which spatial arrangement, but little else. In particular, there was no representation of the place values of the different digits, nor of the current value of either the subtrahend or the minuend. In this representation, a subtraction problem appears as two strings of digits. The representations for the regrouping and the augmenting algorithms were very similar.

If the learner thinks of a subtraction problem in terms of physical operations on the digits in the problem display, he or she cannot benefit from conceptual instruction. For example, instructions that mention the place value of a particular digit can have no impact on a learner who has not internally represented that place value. There is nothing for such an instruction to relate to. The constraints we supplied to HS in the mechanical case were shallow and superficial. They were not derived from the laws of the number system, and they did not mention the conceptual or mathematical meaning of the operations involved.

What does it mean to do subtraction conceptually? The learner who does subtraction conceptually thinks about the numbers symbolized by the digits in the problem display, and he/she is aware of the mathematical interpretation of the actions performed on that display. Consistent with this view, the HS representation for conceptual learning was very different from the HS representation for mechanical learning. In the conceptual representation, a subtraction problem is encoded at the top level as a difference between two numbers. The subtrahend and the minuend are both associated with particular additive decompositions, i. e., sets of numbers that add to those numbers. The elements of the additive decompositions are associated with a face value and a place value. In the conceptual representation, the distinction between numbers and digits is explicit, and the face values of the additive components are associated with the digits in the problem display. The operations of crossing out and writing digits correspond to internal, mental operations on the numbers symbolized by those digits. The representations for the regrouping and augmenting algorithms were once again very similar.

In addition to the representation of the problem and the constraints, HS must also be given some initial procedural knowledge. Without initial rules HS cannot generate behavior, and so cannot discover constraint violations. In the simulation runs presented in this subsection, HS was *given* the correct procedure for *canonical* subtraction problems, i. e., problems in which the minuend digit is larger than the subtrahend digit in every column. The system *learned* to solve *non*-canonical problems, i. e., problems for which the minuend digit is larger than the subtrahend digit in at least one column. In common parlance, the system learned to 'borrow'. I shall refer to this process as *canonicalization*, since the purpose of 'borrowing' is to bring a non-canonical problem onto canonical form. In summary, the system learned two different canonicalization methods, regrouping and augmenting, with two different representations of each method.

In each training run the system tries to solve its current problem. Since the rules for canonical problems cannot handle non-

canonical problems, the system commits mistakes. The mistakes are identified by the constraints, and the system applies its learning mechanism to revise the rules. It then starts over. Eventually it learns to solve the problem correctly. If the system is given a second training problem, it may or may not solve that problem correctly. It depends on the relation between the training problems. If it fails to solve the second training problem correctly, it revises its procedure further. In the simulation runs reported below, the system was fed successive training problems until it arrived at the correct subtraction procedure. The number of training problems required varied between two and four, depending on condition. The correctness of the learned procedure was verified by running it on the 66-item subtraction test described earlier in this chapter.

Computational results

Table 2 shows the amount of computational work required to learn to canonicalize in each of the four conditions, summed over all training problems in each condition. It contains several interesting effects. First, the regrouping models require more learning to handle columns with blocking zeroes than columns without blocking zeroes. The augmenting models, on the other hand, are not affected by blocking zeroes. Second, regrouping is computationally more expensive than augmenting. The only exception is that if we disregard blocking zeroes, then regrouping is easier to learn than augmenting *with a mechanical representation*. Third, conceptually based learning is more complex than mechanical learning for both regrouping and augmenting. Also, the difference between the conceptual and the mechanical representations is larger in the case of regrouping than in the case of augmenting. The conceptual regrouping model required 2.3 as many cycles as the mechanical one, while the conceptual augmenting model required 1.3 as many cycles as its mechanical counterpart. Finally, it makes no difference whether we measure the computational complexity by the number of cycles or by the number of search states visited during learning. All effects mentioned here occur in both variables.

Table 2. The amount of computation required by the HS model to learn to canonicalize under four different conditions, measured both in terms of the number of search states visited and the number of production system cycles required.

	Type of representation			
	Conceptual		Mechanical	
Algorithm learned	States	Cycles	States	Cycles
Regrouping				
No blocking zeroes	968	940	464	449
Blocking zeroes	1843	1815	828	794
Augmenting				
No blocking zeroes	889	862	689	687
Blocking zeroes	889	862	689	687

It is, of course, possible to question the psychological relevance of both the number of production system cycles and the number of search states visited. Both measures are heavily dependent on the theoretical assumptions behind the simulation model. If the human learner is not doing search, or if human cognition is not a production system architecture, there might be no relation between these measures and measures of cognitive work in humans. In addition, both measures depend on the particular implementation of the four simulation models.

But the complexity of the four learning processes can also be measured in terms of the number of learning events and the number of rules learned. A learning event is an event in which the system discovers a constraint violation, and revises its current rule set. A learning event might lead to the construction of one or more new rules. The number of learning events required is not primarily a function of the theoretical assumptions behind the models or of the implementation details. It is a measure of how many 'things' there are to learn before the correct procedure has been acquired; it is primarily a function of the logic of the learning task.

Table 3. The amount of learning required by the HS model to learn to canonicalize under four different conditions, measured both in terms of the number of learning events required and the number of new rules created.

	Type of representation			
	Conceptual		Mechanical	
Algorithm learned	Events	Rules	Events	Rules
Regrouping				
No blocking zeroes	23	35	16	23
Blocking zeroes	32	50	24	32
Augmenting				
No blocking zeroes	20	29	18	24
Blocking zeroes	20	29	18	24

Table 3 shows the amount of learning required to master regrouping and augmenting, measured in terms of the number of learning events as well as the number of new rules learned. All the effects observed in Table 2 are reproduced in Table 3: Regrouping is more complex to learn than augmenting (except for problems without blocking zeroes, in the mechanical representation), the conceptual versions require more learning than their mechanical counterparts, and the difference between the conceptual and the mechanical versions is larger in the case of regrouping than in the case of augmenting. All effects appear with both measures. The main difference between Tables 2 and 3 is that both the absolute values and the relative size of the various effects are smaller.

Table 4. The amount of instruction required by the HS model to learn to canonicalize under four different conditions, measured both in terms of the number of constraints (instructions) required and the number of training problems needed.

	Type of representation			
	Conceptual		Mechanical	
Algorithm learned	Constraints	Problems	Constraints	Problems
Regrouping	31	4	21	4
Augmenting	25	2	20	5

Table 4 shows yet another way to measure the outcome of the simulation experiments. Instead of measuring the amount of *learning*, Table 4 measures the amount of *instruction* needed to teach the HS model the two subtraction algorithms. The amount of

instruction is measured in terms of how many constraints--instructions--we had to provide HS with in order to bring it up to correct performance. All the relevant effects from the other tables are reproduced in this variable. Regrouping requires more constraints than augmenting, and the difference is larger in the conceptual than in the mechanical case.

The amount of instruction can also be measured in terms of the number of training problems needed to bring the model up to correct performance. This measure shows a different pattern: With respect to regrouping, the number of training problems is the same for both conceptual and mechanical representations. Augmenting requires one more training problem than regrouping in the mechanical representation. Finally, to learn augmenting with the conceptual representation requires only two training problems, the lowest of the four measures. This is the only case where the conceptual representation has an advantage. The number of training problems is a coarse measure of the complexity of the learning processes involved, and this result carries little weight against the consistent pattern across the five other measures.

Discussion of substantive conclusions

The results from the learning runs imply, briefly put, that regrouping is more difficult than augmenting, and that learning subtraction conceptually is more difficult than learning it mechanically. Since these results go against current wisdom in the mathematics education community, it is natural to ask what confidence we can place in them. The simulation model that produced these results might not be an accurate model of human learning. There is the possibility that the production system hypothesis is wrong. Also, the particular learning mechanism implemented in HS might not correspond to any type of learning that humans do. In either case, we would have to admit that HS does not simulate human performance or learning. The relevance of the computational results to instruction is then doubtful.

Another possibility which would lessen the relevance of the computational results is that the production system hypothesis is correct, but HS is the wrong implementation of it. Simulation models are always underdetermined by the theories they embody [26]. There is always the possibility that the computational results depend upon this or that technical detail of the implementation. It would clearly be capricious to base instruction on results which depend on programming style.

Although both of these objections to computer simulations are valid in principle, I believe that the particular computational results reported here are principled. The effects in Tables 2 through 4 are not caused by this or that exotic feature of the implementation of HS, but by the fact that the gap between principles and procedures in arithmetic is wide, much wider than the intuitions of mathematically literate people suggest. To support this claim, I will discuss three aspects of that gap: the role of spatio-temporal relations, the function of expediency in algorithm design, and the importance of attention allocation.

The role of spatio-temporal relations. Equality relations between quantities are timeless and without spatial interpretation. For example, the associative law

$$(a + b) + c = a + (b + c)$$

states that the sum of any two numbers x and c, where x is the sum of any two numbers a and b, is equal to the sum of the two numbers a and y, where y is the sum of b and c. The law does not say anything about spatial locations or directions. The fact that the law has a left-to-right linear structure is a property of the paper medium. If the law was encoded as a list-structure in a computer, the individual symbols might be distributed in a very different spatial pattern, but the law would have the same meaning. Neither does the law speak about temporal order. The addition operations mentioned in the law are not related through relations such as *before* and *after*; and concepts like *first, next*, and *last* have no role in the

understanding of the law. The laws of the number system express equality relations abstracted from time and space.

The control of action, on the other hand, is all about spatio-temporal relations. The main function of an algorithm or a problem solving procedure is to order primitive actions in time, to regulate which action is to be done before or after which other action. Furthermore, the actions, to the extent that they are motor actions, have to be performed at some particular location in space, on some particular object. If a digit is to be crossed out, the spatial coordinates for that object must be known. If the right action is performed in the wrong spatial location, an error is likely to result. To learn a cognitive skill is to acquire a structure for the spatio-temporal control of action.

If the mathematical structure--the set of laws that constitute the rationale for a particular algorithm--ignores time and space, and if the cognitive skill involved in executing that algorithm is a structure for spatio-temporal organization, it follows that the mathematical structure does not fully determine the skill. One cannot derive that *this* action has to be performed before *that* action from mathematical laws which do not speak about temporal relations; one cannot direct an action to *this* spatial location rather than *that* with the help of laws which do not speak about space. Information about time and space has to be added to the mathematical principles in order to control action. Knowledge about the mathematical rationale for an algorithm is not sufficient for the construction of the algorithm.

The role of expediency in algorithm design. The belief that mathematical principles determine mathematical action ignores the role of expediency in the design of the place value algorithms. Why, for example, do we solve place value problems by processing the columns in order from lower to higher place values? There is no *mathematical* reason for this rule. It is equally correct to begin subtracting to the left, i. e., with the highest place value column, and work towards the right, i. e., towards columns with lower place values. Unlike the standard procedure, this alternate procedure,

although mathematically correct, requires that the already processed columns have to be processed again every time the minuend is regrouped. Beginning with the lowest place value column saves work; it is a choice dictated by expediency, not by correctness. Indeed, there is no mathematical reason to regroup in the first place. It is possible to perform subtraction by processing each column independently of the others, recording negative results when appropriate, and then combining the column results into the final answer. The decision to regroup is dictated by economy considerations, not by mathematical principles.

The place value algorithms evolved over a long period of time as efficient means of performing calculations. The main reason to adhere to those algorithms is that they save work, as compared to other, equally correct procedures. But there is no relation between the mathematical theory of place value and the expediency of the algorithms that build on it. One cannot derive that *this* way of doing subtraction is more efficient than *that* way from the laws of the number system. The shape of these algorithms is not determined by the underlying mathematical principles, so understanding those principles contributes little to the learning of the algorithms. Any aspect of a procedure which is grounded in expediency rather than in mathematical concepts and relations will appear arbitrary and incomprehensible regardless how well the conceptual rationale for that procedure is understood.

School children cannot be aware of the expediency of the place value algorithms. In order to realize how economical they are, one must have something to compare them to. Since children are taught the efficient algorithms, they have no experience of *less* efficient ways of doing calculations. Also, since children are not doing calculations for a living, they have no interest in expediency.

The importance of attention allocation. One of the most robust findings of cognitive psychology is that there are severe limits on how much information can be kept in working memory at any one point in time. This limitation is simulated in the HS system by letting working memory elements decay as time passes. The main

consequence of this limitation is that the control of attention is a central issue in all action, including mathematical action. If you cannot keep all information in the problem display in your head simultaneously, then you have to access it sequentially, by moving your eye over it in a carefully controlled manner. *To learn subtraction is to learn where to look.* Obviously, mathematical principles have nothing to say about this aspect of mathematical action. No matter how well one understands the concept of place value, one still has to figure out where to look at each moment during subtraction.

In summary, there are at least three principled reasons to believe in a wide derivational gap between mathematical principles and mathematical action. First, mathematical principles ignore questions of space and time, while a cognitive procedure is a structure for the spatio-temporal control of action. Second, mathematical principles ignore the cost of computing a result, while the standard place value algorithms are designed for maximum expediency. Children cannot understand those features of place value algorithms which are designed with expediency in mind, because they have no experience of the less expedient alternatives; and, unlike the professional calculators who developed the algorithms, children have no particular interest in economy. Third, the limited capacity of human working memory implies that all task information cannot be kept active at all times. Consequently, any cognitive skill must specify how attention is to be allocated over the task information. But mathematical principles have nothing to say about the allocation of attention.

If the gap between mathematical principles and mathematical action is as wide as the above discussion suggests, then how is an understanding of the mathematical concepts and principles underlying a particular algorithm supposed to facilitate the construction of the cognitive skill? This question has not been clearly answered by any current theory of mathematical cognition, and I suggest that no answer exists. The gap between mathematical knowledge and mathematical action *is* difficult to bridge; that is why it took two millennia to develop the place value algorithms,

and that is why school children make mistakes even after they have grasped the rationale of an algorithm.

The fact that the derivational distance between mathematical principles and mathematical action is large does not in and of itself explain why the HS model needs to compute more in the case of a conceptual representation than in the case of a mechanical representation. Granted that the derivational distance is large, we still need an explanation for why it is *larger* in one case than in the other. The explanation is simple: There is more work involved in updating and processing a rich representation than an impoverished one. There are more relations to keep track of, and therefore more operations to perform. Each of those operations has to be controlled by some procedural rule; hence, there are more rules to learn, or more complicated conditions for the rules. The same must be true of humans; updating and maintaining a richer mental representation must require more cognitive work.

Because the gap between the mathematical principles and the mathematical procedures is so wide, I believe that any reasonable simulation model of knowledge-based acquisition of an arithmetic procedure will reproduce the results reported here. The reader who disbelieves this is urged to prove me wrong by developing a simulation model that can learn subtraction both conceptually and mechanically and which expands less computation in the former case than in the latter.

According to the results reported here, William Brownell could not have been more wrong. Regrouping is more difficult to learn than augmenting. In particular, regrouping in a conceptually rich representation is more difficult to learn than regrouping done mechanically, and the disadvantage of the conceptually rich representation as compared to the mechanical case is much larger for regrouping than for augmenting. These results directly contradict Brownell's conclusion that regrouping is easier than augmenting, particularly when taught conceptually [5, 6].

At first glance, this contradiction seems devastating for the model. After all, Brownell's conclusion was based on empirical observations, and in the case of a contradiction between theory and data, it is the theory that must go. However, unlike simulation studies, empirical studies cannot differentiate between learning and performance, between the amount of cognitive work needed to learn an algorithm and the amount of cognitive work needed to execute it, once learned. The only way to measure the cost of learning is to observe performance, so any empirical measure will necessarily confound the two. As the reader might recall, the simulation of performance in the first study reported in this chapter did produce results which fit the empirical data rather well. It is reasonable to interpret those data as measures of the cognitive cost of executing the algorithms rather than of the cognitive cost of learning them. We then have a good fit between the theory and *the data themselves*, but no support for Brownell's *interpretation* of the data.

The result that conceptual instruction requires more computational work than mechanical instruction is comforting to the researcher who desperately wants to know why well-intended, carefully planned and skillfully executed instructional interventions that aim to impart conceptual understanding do not succeed in producing correct performance [27, 33]. But it is less comforting to the educator or teacher who is responsible for designing efficient instruction. The simulation results imply that it is a mistake to expect conceptual understanding to *facilitate* procedural learning. Instead, the results indicate that conceptually based instruction will be more costly in terms of time and effort than mechanical instruction. The relation between the conceptual rationale of an arithmetic procedure and the procedure is an instructional topic in its own right, a topic, moreover, which is complicated and therefore requires time and effort on the part of both instructor and student. Instead of being a tool for teaching (the same old) arithmetic, *conceptually based instruction in arithmetic constitutes a higher pedagogical ambition*, as compared to mechanical instruction.

It is easy to feel sympathy with this higher ambition. We obviously want students to grasp the rationale behind the arithmetic algorithms. The present discussion is not meant to imply that conceptual instruction in arithmetic is wrong or undesirable. What is wrong is the expectation that such instruction can be digested easier and with less effort than mechanical instruction.

Conceptually based instruction in arithmetic might need to revisit the idea of a spiral curriculum [7, pp. 52-54]: Teach the algorithms with a small amount of conceptual interpretation at an early age; teach them again with a deeper presentation of the conceptual rationale when the students have aquired more mathematical knowledge; and so on. The topic could be visited as many as four our five times between third grade and college, each visit probing deeper into the conceptual rationale, until the students are able to carry out a relatively tight derivation of the algorithms (e. g., as in [25]). To the best of my knowledge, no large scale empirical evaluation of such a spiral curriculum for arithmetic has yet been done.

Evaluation of the General Method

The specific conclusions about arithmetic instruction presented in this chapter are controversial and unlikely to be accepted without a debate. Such a debate would be welcome. But the controversial nature of the *domain-specific conclusions* should not be allowed to obscure the fact that the present study also contributes a *general method* with a potentially greater impact.

The main method of traditional educational research is well exemplified by the studies conducted in order to choose between the regrouping and augmenting algorithms: To determine the relative advantage of an instructional design A as compared to an alternative design B, teach one set of students with design A and a second set of students with design B, and compare the outcomes. This empirical method is laborious and time consuming. In addition, it is rarely successful in settling the instructional issue at hand. Measures of instructional outcomes are so imprecise and coarse

that a negative outcome is unconvincing. The opponents of the hypothesis favored by the author of such a study can always feel justified in questioning whether the measures used were sensitive enough to register even quite significant effects. On the other hand, a positive effect is equally unconvincing. An observed effect cannot be ascribed to the instructional intervention with any certainty, because it is almost impossible to achieve control over all the determinants of an instructional outcome. Empirical comparisons between alternative instructional designs carry little intellectual authority, regardless of outome.

Teachable simulation models enable an alternative method for investigating instructional questions. Instead of teaching the relevant instructional topic in different ways to different groups of students, we can teach it in different ways to a model of learning, if that model takes the form of a robust, runnable simulation. The simulation runs provide us with measures of the amount of computational work required to learn the target topic under different modes of instruction. A significantly lower value for mode A than for its rival B constitutes a prediction that A is the preferred way of teaching the target topic.

Using this method, an instructional designer can invent a new approach to a particular topic, use it to teach that topic to the model, and have a preliminary outcome, all in a matter of days. Preparing the inputs (the initial procedural knowledge and the instructions) to a teachable simulation model is not a trivial task, but it is measured in hours or days, rather than in months or years. Such rapid turnaround between an instructional idea and its evaluation has the potential to facilitate search through the space of instructional designs [30]. Many different designs can be tried and compared at a relatively low cost and in a relatively short time.

A teachable simulation model can also help identify fruitless questions and inappropriate techniques. Consider once again the large scale classroom studies of the pre-World War II era that attempted to settle the controversy between regrouping and augmenting empirically. My simulation results show that there is no

reason to expect any differences between regrouping and augmenting on measures of *performance*. The two algorithms are nearly equal in cognitive complexity, once learned. Hence, trying to measure the difficulty of the two algorithms by measuring performance is not a useful endeavor. The differences between the algorithms only affect the amount of cognitive work required to *learn* the algorithms. But pure empirical measures of learning are hard to come by. One possibility is to count the number of learning events per unit time as revealed by think-aloud protocols, a measure hardly ever used in learning research (but see [40] for an exception). No such measure was employed in the pre-World War II studies that compared regrouping and augmenting. Those studies could not, in principle, resolve the issue they were addressing, because they were approaching it with the wrong tools. Theoretical clarification is a necessary prerequisite for meaningful data collection in instructional science as in other sciences. Implementing and using a teachable simulation model is one way to achieve such clarification.

A second traditional approach to instructional design, over and above empirical comparisons between alternative teaching methods, is to base particular decisions on general design principles, which, in turn, are derived in some more or less intuitive way from a learning theory. The debate about how to teach subtraction could conceivably be decided by the application of such a principle. For example, we could apply the principle of successive elaborations: A topic should be taught by first presenting a kernel idea, an epitome, which is then successively elaborated [32]. But this principle does not discriminate between the different ways of teaching subtraction. Both regrouping and augmenting can be taught by first presenting the basic idea of the algorithm, and then elaborating it. As a second example, consider the principle, proposed by Anderson, Boyle, Farrell, and Reiser, that one should teach the goal hierarchy of the target skill [2]. Once again, this principle does not discriminate between alternative subtraction algorithms. As a last example, a colleague of mine suggested that one should prefer regrouping over augmenting on the principle that teaching should facilitate *future* learning, and the regrouping operation is more

generally useful than the augmenting operation. But it is unclear in what sense the law of associativity is more generally useful than the constant difference law; both seem equally necessary for continued study in mathematics. In short, the disadvantage of using general design principles as mediators between theories of learning and instructional designs is that the application of those design principles is seldom straightforward.

The method of teachable simulation models links learning theory to instructional design in a different way. The method brings learning theory to bear on particular issues, without mediation by general design principles. For example, the simulation runs presented in this chapter tell us that augmenting is easier to learn than regrouping and that the advantage of augmenting is increased with conceptually based instruction. The simulation runs resolve the particular issue of regrouping versus augmenting, but they do not suggest any principle of arithmetic instruction, let alone any general design principle. The principles of learning embedded in the model are applied directly to the instructional issue at hand. Whether this is, in general, a better way to proceed than via general design principles cannot be determined here. The two different ways of linking learning theory to instructional design are not incompatible. A mixture of both approaches will probably prove most advantageous.

Testing instructional designs by trying them out on a simulation model seems to presuppose that we have accurate simulation models. There are three answers to this objection. First, the lack of accuracy of today's models and theories is a temporary disadvantage. As research into human learning progresses, we will be able to construct more accurate theories. It is desirable to have a method which allows us to channel increased theoretical understanding into improved instructional designs. The dependence on the accuracy of our learning theory is not (only) a bug, it is (also) a feature. Second, the extent to which particular computational results depend upon the accuracy of the model is a matter for debate. In the preceeding section I argued that the results reported in this chapter are consequences of deep features of arithmetic, and

hence relatively independent of the particulars of the HS model. (It is clear how to provide evidence for or against claims of this kind: A claim about independence of results from a particular model is supported if the results can be reproduced with a different model.) Third, a theory need not be entirely accurate to be useful. Even approximate theories can often supply information that improve upon common sense and rules of thumb.

Answering questions through theoretical calculations goes against the grain in a discipline that was shaped in the heydays of the peculiar brand of empiricism advocated by the logical positivists. It is therefore useful to look up from our local concerns and observe that the ratio of theoretical calculation to empirical observation tends to grow as scientific disciplines mature. Once upon a time, geometers measured angles in order to decide whether a triangle was a right triangle or not. By the time Euclid wrote his great treatise, geometry was already a purely theoretical discipline in which answers to questions are derived from first principles. Mechanics went through a similar development. Brahe and Galileo needed observations, but since the "rational mechanics" of the 19th century, questions like how much force it takes to lift a particular payload into orbit are answered by calculation, not by observation. If it were necessary to send up hundreds of rockets with different payloads and different thrusts in order to decide the issue empirically, space travel could never have gotten off the ground. In short, to observe is to confess ignorance; it is what scientists do when they have little or no theoretical understanding. As a science matures, calculations replace (some) empirical measurements. There is every reason to expect instructional science to develop similarly. The present chapter is but a small step in that direction.

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